



**STATE OF NEW JERSEY**

**FINAL ADMINISTRATIVE ACTION  
OF THE  
CIVIL SERVICE COMMISSION**

In the Matter of Dorothy Williams,  
Department of the Treasury

CSC Docket No. 2019-3474

Classification Appeal

**ISSUED: AUGUST 16, 2019** (SLK)

Dorothy Williams appeals the determination of the Division of Agency Services (Agency Services) that the proper classification of her position with the Department of the Treasury is Senior Clerk. The appellant seeks a Technical Assistant classification.

The record in the present matter establishes that the appellant's permanent title is Senior Clerk. The appellant sought reclassification of her position, alleging that her duties were more closely aligned with the duties of a Technical Assistant. The appellant is assigned to the Division of Revenue and Enterprise Services, Processing Operations, Mail and Document Prep Remittance, Processing and Scan and Records Management and her immediate supervisor is Yolanda Clayborn, Supervisor Data Preparation. The appellant has no direct supervisory responsibility. In support of her request, the appellant submitted a Position Classification Questionnaire (PCQ) detailing the different duties that she performs. Agency Services reviewed and analyzed the PCQ completed by the appellant and all information and documentation submitted. Agency Services found that the appellant's primary duties and responsibilities entailed, among other things: inspecting boxes received from vendors for accurate accounts of tax returns, vouchers, checks and/or transit; processing incoming mail which includes extracting the mail, date stamping all mail and/or screening the mail for proper write-ups; screening various tax returns such as 1040 Resident, Non-Resident, Fiduciary and Property Tax; verifying taxpayers in the mainframe system when tax returns are missing miscellaneous information; responding to less complicated inquiries and/or correspondence; and picking up returns and delivering checks to and from various

units to ensure that they are processed in a timely manner. In its decision, Agency Services determined that the duties performed by the appellant were consistent with the definition and examples of work included in the job specification for Senior Clerk.

On appeal, the appellant presents that she spends at least 50 percent of her time on tax returns. She indicates that she verifies W2s to match the income and withholdings reported on each tax return. Additionally, the appellant reviews the returns to confirm that the taxpayer worked within New Jersey or another state to determine if the taxpayer should be filing as a resident or non-resident, and to ensure that the returns are complete and the information is listed in the correct area. She presents that she uses a database to locate missing information and records it on the taxpayer's document when necessary. The appellant indicates that she spends 15 percent of her time reviewing and verifying information on inheritance tax returns, which includes matching documents with any prior returns on file, indicating what information has been received, preparing returns for scanning, and contacting estates if additional information is needed. Further, she spends 15 percent of her time reviewing special requests from taxpayers such as where a taxpayer indicates that they never received last year's refund. This includes using a database to see if any refunds or payments have been recorded and how they were applied. She also uses the database to verify if prior documents had been submitted by the taxpayer, to locate and record missing information and to view the taxpayer's account. The appellant then determines if correspondence needs to be sent to the taxpayer for further action. She represents that she spends 10 percent of her time reviewing checks and vouchers to ensure that they are prepared properly. This examination includes reviewing the voucher to verify all of the taxpayer's required information, such as name, address and social security number, and she verifies that the check amount listed on the voucher is equal to the amount written on the check and determines if the voucher will be scanned or keyed by hand. She also spends five percent of her time on verifying counts for shipments received from vendors and recording and reporting discrepancies and five percent of her time performing other functions such as assisting others and opening mail. The appellant summarizes her duties by indicating that the majority of her time is spent reviewing and verifying tax documents.

## CONCLUSION

*N.J.A.C. 4A:3-3.9(e)* states that in classification appeals, the appellant shall provide copies of all materials submitted, the determination received from the lower level, statements as to which portions of the determination are being disputed, and the basis for appeal. Information and/or argument which was not presented at the prior level of appeal shall not be considered.

The definition section of the Senior Clerk (A08-20043) job specification states:

Under direction of a supervisory official, does clerical work involving the exercise of independent judgment and containing a relatively large proportion of difficult tasks, and/or instructs individuals in the work of a clerical unit; does other related duties as required.

The definition section of the job specification for Technical Assistant (A12-51329) states:

Under supervision of a supervisory official in a State department or agency or a local jurisdiction, performs technical functions in providing information and assistance in reviewing and verifying data of a routine nature; does other related duties.

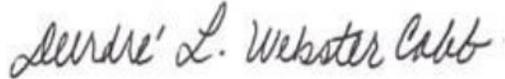
In this matter, the main difference between the Senior Clerk and Technical Assistant titles is that incumbents in the Senior Clerk title primarily perform clerical duties, while Technical Assistants primarily assist technical personnel. Further, a review of the Examples of Work for Senior Clerk indicates that incumbents review and check documents for completeness, may exercise independent judgment to correct and/or complete documents, and check and verify vouchers and statements. A review of the Examples of Work for Technical Assistant indicates that incumbents perform research and/or receive guidance from technical personnel to supply the information provided. Technical personnel interpret and apply laws, rules, and regulations. *See In the Matter of Personnel Management Analyst II (PS8711C)* (MSB, decided June 14, 1994). A review of the appellant's PCQ indicates that she spends 30 percent of her time processing incoming mail, 30 percent of her time screening tax returns, 20 percent of her time checking boxes received from vendors for accurate counts of tax returns, vouchers, checks, and transit reports, 10 percent of her time looking up taxpayer information in a database and sending correspondence, and 10 percent of her time picking up returns and delivering checks to ensure that they are timely processed. Additionally, the appellant acknowledges on appeal that the majority of her time is spent reviewing and verifying tax documents. These duties are consistent with the definition and Examples of Work for a Senior Clerk. Moreover, the appellant is not performing research and/or receiving guidance from technical personnel to supply the information required. As such, the predominance of the appellant's duties are best described as being clerical in nature.

### **ORDER**

Therefore, it is ordered that this appeal be denied, and the position of Dorothy Williams is properly classified as Senior Clerk.

This is the final administrative determination in this matter. Any further review is to be pursued in a judicial forum.

DECISION RENDERED BY THE  
CIVIL SERVICE COMMISSION ON  
THE 14<sup>th</sup> DAY OF AUGUST, 2019



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